Project Managers' Advisory Group

MINUTES
April 18, 2011

Attending: (* = by phone)

Bob Giannuzzi	EPMO
Kathy Bromead	EPMO
Charles Richards	EPMO
Jesus Lopez*	EPMO
Valerie Maat*	EPMO
Alisa Cutler*	EPMO
Vicky Kumar*	OSC
Lucy Cornelius*	DPI
Ellen Zimmerman*	DHHS DPH
Barbara Swartz*	DHHS/DPH
Gary Lapio*	DHHS DIRM
Sarah Joyner*	ESC
Larry Sanders*	ESC
Jodi Bone*	ESC
Lloyd Slominsky*	Dept. of Corrections
Cheryl Ritter*	DOT
Chris Cline*	NCCCS
Colleen McCarthy*	SOS
David Butts*	WRC

Bob Giannuzzi welcomed everyone to the meeting.   There were no first time attendees or new PMPs to acknowledge.

Bob solicited and received approval of the March minutes.

Jesus Lopez reported that PMP Exam Prep Class Cycle 12 is in progress with an energetic, enthusiastic student body.

Kathy Bromead advised that only five projects were submitted to the Office of the SCIO as candidates for this year's NASCIO IT project awards. She has extended the deadline and encouraged the agencies to think of other successful projects to submit.

Bob reported the following upcoming events at NCPMI and PMI webinars (since updated):

NCPMI Venue	Speaker	Date/Topic
General Membership	Sharon Hill	April 21 (6:00 PM) Pumping Up Your Professionalism
Public Sector LIG	Sharon Hayes	May 5 (5:30 PM) Sourcing Management
PMO Committee		May 25 (6:00 PM) TBD

Leadership Committee		No meeting scheduled
Information Systems Committee		No meeting scheduled
Free Webinar (must subscribe to Ethics in Project Management CoP)	Vicky Kumar	April 21 (noon – 1:00 PM) Ethical Considerations in Implementing Requirements Management Processes
Free Webinar (must subscribe to Government CoP)	Suzanne Medeiros	May 15 (noon – 1:00 PM) Challenges, Successes & Results of a Public Sector Project
Free Webinar (must subscribe to Agile CoP)	Mike Cohn	April 19 (11:00 AM – noon) Agile & The Deadly Seven Sins of Project Management
Free Webinar (must subscribe to Information Systems CoP)	Ricardo Viana Vegas	May 4 (noon – 1:00 PM) Using the Analytic Hierarchy Process (AHP) to Select and Prioritize Projects in a Portfolio

Kathy reviewed a summary of issues reported in PPM over the last two years. In a spreadsheet prepared by Janet Stewart, about 1700 issues were categorized and associated risks were identified. The file is being sent out with these minutes so that the group can review it and provide feedback to the EPMO on how to avoid/eliminate some of these issues.

The progress of the EPMO work groups was discussed next.
- **SDLC** to address integration of alternate SDLCs (e.g., Agile) into the current process/workflow. No report.
- **Agency Procurement** to develop a common (within agency) procurement process. Documentation of the process is available the EPMO website. The next revision will include additional reference material and templates.
- **Business Case** to develop guidelines and provide training on justifying projects based on cost/benefits analysis. Bob reported that the group is wrapping up the cost/benefit analysis template. They will next focus on training material.

Alisa Cutler reported on Methodology Task Group activity. Feedback on the RASCI template has been favorable. The group is working on revision of the Communication Plan document.

Charles Richards advised the group that a CR training session (AdobeConnect) will be conducted at 9:00 AM on 5/11.

Kathy pointed out that the next update to the EPMO website is slated for June.

Lessons Learned from recently closed projects are included in the Appendix.

Meeting adjourned at 3:51 PM.

Monday, May 16, 2011 at 3:30
333 Six Forks Road Conference Room 5 or (919) 981-5581

https://its.ncgovconnect.com/r96139571/

APPENDIX

Lessons Learned Documentation

Exhibit A

Department of Agriculture - Enterprise IP Telephony System

Topic	Lessons Learned
1. Other	Project Manager should be involved at the beginning of the project and not towards the end.

Exhibit B

ITS - NCID Next Generation Upgrade

Initiation Phase:

Topic	Things that could have been improved on	Things that went well, that we are proud of, that we must do again
1. Benefits	Benefits should not be required for a software upgrade.	
2. Procurement Plan (procurement strategy….build vs. buy)		Decision to do a fixed price contract vs. T&M with Novell
3. Project Approval Process	Project approval process was slow	

Planning & Design Phase:

	Topic	Things that could have been improved on	Things that went well, that we are proud of, that we must do again
1.	Managing Sponsor Expectations	Sponsor changed several times due to management changes	Monthly project review meetings with executive management
2.	Managing Customer Expectations	ITS did not have a BRM to assist with the rollout. Customers were not sufficiently engaged with requirements, at the direction of the Deputy CIO.	Having a good communication plan and training plan, engaging BRM's and having a single point of contact for communications. ITS DA was engaged with the project team to assist with testing, design, and training
3.	Project Schedule / Milestones / Project Planning	After initial design was complete, delay of several months in making procurement decision to move forward. Project started and stopped several times due to upper level management turnover and contract negotiations.	
4.	System Design Document	Extensive effort and funds was spent on a prototype project with Oracle that was not subsequently used. Novell's Architecture had to be revisited after Implementation Password Management Framework decision was rushed to meet the timeline resulting in less than desirable end product. Allowed a one-off in the design for a specific application (VPN).	Having vendor deliver initial architecture gave a good starting point for build. Having servers virtualized was helpful and cost effective, but did create some issues.
5.	Requirements Mapping	Agency DA's were not involved in the requirements gathering.	Maintained an Enterprise perspective on requirements, rather than allowing an agency to drive the requirements. New features such as agency transfer have increased productivity.
6.	Vendor Project Management, Communication	Oracle did not have a complete product that would work in our environment.	Decision to have the vendor produce the architecture and high level design, then develop with internal resources, supplemented by T&M engagements gave us more control and management of the development effort

Execution & Build Phase:

	Topic	Things that could have been improved on	Things that went well, that we are proud of, that we must do again
1.	Managing Sponsor Expectations		Bi-weekly meetings with executive management kept them abreast of the status and issues
2.	Managing Customer Expectations	Customers did not understand their own applications and integration points. Required more assistance from the project team than expected.	Monthly communications to the agencies. Presentations at the CIO meetings and NCLGISA
3.	Project Schedule / Milestones / Project		Having a full time project manager was essential.

	Planning (Coordination subproject activities)		Assigning a technical / team lead from the development team also facilitated decision making and task management.
4.	Resource Management (internal & external resources)	Project Team was also supporting operations.	Dedicated technical writer, PM, other sections allocated resources as requested. Weekly Scorecards helped external agencies assign resources.
5.	Vendor Management / Vendor Performance / Vendor Deliverables	Hiring a T&M resource without fixed deliverables for development was not efficient. They did not fully understand our requirements. Expectations from Vendor consultants (architect) were not met. The Project Manager the vendor supplied was unprepared	On-site DSE familiar with the product was indispensable.
6.	Project Communication	Poor feedback from agencies regarding status of migrations and functionality.	Agency communications were effective in getting the appropriate information dispersed
7.	Change Management/Change Request		Scope was maintained. Change requests primarily due to schedule delays
8.	Testing (test execution, verification & validation, test scripts, test cases)	Unable to accurately simulate a true representation of the "live" environment for load testing. Formal Functional Test plan needed.	Functional Testing and Load Testing were valuable in uncovering issues. Problems were resolved prior to rollout. Good participation from SQA group assisted with functional and load testing
9.	Setting up environments/Infrastructures	Provisioning of large enterprise systems at ITS was not efficient. Delays due to: network configuration had to be redesigned. SAN storage was not performing correctly. DBA's had no experience with clustering SQL server. Time synch in VMWare was an issue. Architecture design changed during load testing. Unable to accurately forecast customer load.	

Implementation Phase:

Topic	Things that could have been improved on	Things that went well, that we are proud of, that we must do again
1. Managing Customer Expectations		Good communications with the agencies. Agency training, webinars, video snippets and extensive documentation were effective for training a broad based audience. Hiring a dedicated Technical Writer for the project was a value add. Engaging the service desk &

	Topic		Things that went well, that we are proud of, that we must do again
			supplementing their staff
			Application Scorecard and User Migration Schedule distributed weekly kept migrations on track
			No DA's for community colleges
			Communications with local governments impaired – no effective way to communicate with them.
2.	Risk Management		Issues and risks were escalated and addressed timely and appropriately
3.	Project Schedule / Milestones / Project Planning (Coordination subproject activities)		Full time PM engaged, weekly tracking, weekly team meetings kept the project on schedule. Rollout completed within one week of plan – for a 3 year project.
4.	Resource Management (internal & external resources)		Managers gave the appropriate priority for resources provided to the team.
5.	Vendor Management / Vendor Performance / Vendor Deliverables	Although better than Oracle, Novell's support response time leaves room for improvement.	
6.	Project Deliverables		Product delivered was stable, no major rollbacks required.
7.	Setting up environments/Infrastructures		Having isolated environments for lab, and customer testing
8.	Big Bang vs. Phase rollout		Separation of user migration and application migrations improved the success of the rollout.
9.	Training (user, admin, etc i.e.: AIM)		New system much easier for DA's to use Training was effective and reduced number of trouble tickets
10.	Other	Benefits were re-visited during Gate 3, which delayed the approval process	Technical documentation produced by the team is valuable.

General Comments:

Topic	Things that could have been improved on	Things that went well, that we are proud of, that we must do again
1. Project Approval Process	Because this was such a long project, several management changes occurred during the project life cycle. This created a problem during Gate 3 approval, when new management who had not been involved with the initial project charter did not agree with the benefits. A project should not have to rejustify the benefits and risk having the project cancelled during the final 2 months of a 3-year long project.	
2. Change Requests	Moving budget dollars between phases should not require a change request unless the total project budget is exceeded. When one phase ends under budget, it is cumbersome and time consuming to get the funds moved into the next phase and get the gate approved. The project	

	manager should have the discretion to move funds between phases without requiring all the approvals.	